



Stock Gift Acceptance Guidelines

This document sets forth Shirley Ryan AbilityLab's practices for accepting and managing gifts of transferred stock by a donor.

All information obtained from or about donors or prospects shall be held in strictest confidence by Shirley Ryan AbilityLab. The name, amount, or the conditions of any gift shall not be published or disclosed without the approval of the donor, unless required by law.

Stocks and Bonds (includes tax-exempt bonds)

Valuation will be determined by the Shirley Ryan AbilityLab's representative (William Blair & Co.) as the mean between the high and the low on the date of the gift at the time of transfer. The donor will be provided a charitable tax receipt reflecting this amount.

Date of the gift will be:

1. The date certificate is personally handed to the Shirley Ryan AbilityLab's representative (William Blair & Co.).
2. The date of transfer if electronically transferred to an account opened for the Shirley Ryan AbilityLab (at William Blair & Co.).

All gifts of securities will be sold by Shirley Ryan AbilityLab as soon as possible upon receipt. Any exceptions will be determined by the Chief Financial Officer or delegate. Gifts of closely-held securities must be approved by the Chief Financial Officer or delegate before acceptance or non-acceptance.

Shirley Ryan AbilityLab is most grateful for your consideration of a gift of stock. Please contact William Blair & Co. if you wish to transfer stock to Shirley Ryan AbilityLab. You may also contact the Advancement Office with any related questions at 312.238.6013.

Shirley Ryan AbilityLab Stock Broker – William Blair & Co., 150 N. Riverside Plaza, Chicago, IL 60606
Brokers' Assistant – Letty Pagan: 312-364-8604

Account Number – GER019878
DTC Number – 0226
Rehabilitation Institute of Chicago D/B/A Shirley Ryan AbilityLab
Federal Tax ID # – 36-2256036

Shirley Ryan AbilityLab Contact – Nadia E. Joseph, Gift Processing Coordinator
njoseph@sralab.org, 312.238.1257

Please include donor name and donor intent if available.